Social Media and the Australian Seafood Industry

Research Report

12 October 2017

EXECUTIVE SUMMARY

There is an increased impact of social media platforms and the way in which these platforms are used have changed over time[1]. The Australian Seafood Industry reflects this trend in the use of various social media platforms at the individual, business and industry levels.

Consequently, the use of social media platforms such as Facebook by industry necessitates further research into current practices to unlock the potential of these platforms and to identify industry wide standards. As experienced by other agricultural industries successful integration of social media into business practice has increased sales, opened new markets and influenced government policy via social media campaigns.

The key findings of this report include:

1. Social media offers the Australian Seafood Industry a set of online programs to help communicate within industry and to external communities of interest and stakeholders. The research landscape relating to social media and its impact on industry seems limited.

2. The impacts of social media will have impacts at the individual, business and industry association levels.

3. A range of questions and potential research projects could be developed from the topic areas noted in Part 5 of this report, including:
   - Strategic social media;
   - Personal versus commercial use of social media;
   - Role of industry associations;
   - Commercial seafood businesses;
   - Learning from other industries;
   - Community engagement; and
   - Social licence to operate.

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1. INTRODUCTION

With the rapid uptake of social media by individuals over the last 10 years it has become an essential and cost-effective tool for individuals, small to medium sized enterprises (SMEs) and industry associations to communicate with the community and/or stakeholders[2]. However, there is little research specifically relating to the costs and benefits to the Australian Seafood Industry. The purpose of this report is to identify research issues for individuals, SMEs and industry associations working in the Australian Seafood Industry[3].

LITERATURE REVIEW

The analysis taken in this report is to examine social media in various contexts as follows: (1) defining social media (2) the reach of social media, (3) small businesses and social media, (4) return on investment (ROI), (5) community engagement and consultation and (6) social license to operate (SLO).

In addition to the literature review an industry survey was undertaken to explore social media trends within the Australian Seafood Industry. The survey was developed using the following as a guide: (1) the Sensis Social Media Report 2016, 'How Australian people and businesses are using social media' and (2) Clutch B2B Research and Review, 'Social Media for Small Business: 2017 Survey'.

METHODS AND RESULTS

These sections provide the rationale for the survey and description of the data sourced from the survey.

DISCUSSION

A discussion of the results and issues identified by participants.

RESEARCH RECOMMENDATIONS

Using the literature review and survey data a series of research recommendations have been drafted for industry discussion.

ACKNOWLEDGEMENTS

Acknowledgement of contributors to this report

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[2] The terms 'community' and 'stakeholder' can be internal or external to the seafood industry. The complexity of social media when discussing which community or stakeholder are important or have a perceived influence on the commercial seafood industry which will be discussed in Part 4 of this report.
[3] The terms 'individual', 'SMEs' and 'industry' where not otherwise noted refer to the Australian Seafood Industry. It is assumed that social media means something different to each of these groups.

2. LITERATURE REVIEW: SOCIAL MEDIA AND THE AUSTRALIAN SEAFOOD INDUSTRY

This section of the report provides a review of social media literature and some of the key issues facing the Australian Seafood Industry. Terms like 'social media' and 'social media platforms' are terms used interchangeably by media outlets and media commentators. In its simplest form, these words mean:

- Social: Networking with other people, sharing and receiving information.
- Media: An instrument of communication, like the internet (while television, radio, and newspapers are examples of more traditional forms of media).

2.1. DEFINING SOCIAL MEDIA

Social media has become a standard way to communicate in the modern era. Its use has been rapidly adopted with the introduction of mobile smart phones and subscription based social media tools. For the purposes of this report social media is defined as[4]: 'a group of internet-based applications that use Web 2.0 platforms[5], which facilitates the exchange of user generated content'. Box 1 provides a range of social media platforms.

Box 1. Social Media Platforms

Websites and applications that allow users to create and share content and to participate in social networking.

Social media may include, but is not limited to[6]:
- Online blogs and online rating and review sites, such as Reddit, TripAdvisor and Yelp.
- Social networking sites such as Facebook, Twitter, LinkedIn and Google+.
- Video and photo sharing websites, like Instagram, Snapchat, YouTube, Pinterest and Vimeo.
- Corporate networking tools, such as SharePoint, Microsoft Office 365 or Enterprise Jungle.
- Media sites hosting articles with commentary sections, for example Newshub.
- Micro-blogging sites, for example Twitter and Tumblr.
- Forums and discussion groups, such as Warriorforum, Google groups, Yahoo! Groups or Whirlpool.
- Wikis, for example Wikipedia.
- Podcasting sites, for example SoundCloud.
- Online gaming platforms, for example World of Warcraft or Second Life.
- Geo-spatial tagging, such as Foursquare and Facebook check-in.

2.2. THE REACH OF SOCIAL MEDIA

Social media has fundamentally changed how individuals interact and communicate. It has opened up the world by allowing individuals, business, industries and governments to become inextricably

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[4] Kaplan and Haenlein (2010, p. 61).
[5] Web 2.0 refers to World Wide Web websites that emphasize user-generated content, usability, and interoperability for end users (O'Reilly and Battelle 2009).
[6] Sensis (2016, p. 4; 2017, p. 4) and Mehra (2015).

connected[7]. There are compelling arguments for business, particularly SMEs to use and integrate social media into their daily operation. Some of the key benefits of social media to SMEs include[8]:

- Its cost to operate is negligible.

- Increased brand recognition and presence.

- Increased customer acquisition.

- Enables direct and indirect customer interaction.

- Can generate more leads/sales.

- Can persuade/ influence public policy.

Social media is dominating the way in which primary industries are engaging within their sector and with the community and/or stakeholders. In the context of this report, the term 'community' and 'stakeholders' are defined as:

- Community: this term is often used in reference to the general public or in some instances seafood consumers. In this report community means the general public or seafood consumers.

- Stakeholder: for the purposes of this report a stakeholder is not limited to either internal or external individuals or organisations.

Studies in the wine industry have found that when they have integrated a social media presence as part of their business it has had a positive influence on their business[9]. Businesses who ignore or take little interest in the influence of social media are not in a tenable position[10]: 'Whether you view social media as a colossal waste of time or a remarkably advantageous tool, it is the way the world is networking and communicating'.

According to a survey by Sensis, Australian's are using social media platforms and technologies to network and communicate has substantially grown. Some key statistics include[11]:

- Instagram 46% (up from 31%).

- Snapchat 40% (up from 22%).

- Twitter 32% (up from 19%).

- LinkedIn 18% (down from 24% to 18%).

- Facebook 95%.

- Smartphone owners (81%) prefer their smartphone to access social media as opposed to a laptop (30%) or desktop (28%).

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[7] Edosomwan et al (2011, p. 1).
[8] Ciprian (2012, p. 96).
[9] Claussen (2013, p. 359).
[10] Claussen (2013, p. 360).
[11] Sensis (2017, p. 3).

- The 18 to 29-year age-group is most likely to access social media as the first thing in the morning (79%), the last thing at night (65%) and at work (46%).

Is there a compelling reason to engage in the social media space? Using the measure of how quickly different media platforms attract users provides a basis for deciding if social media is potentially beneficial for the Australian Seafood Industry. In terms of radio, it took almost 40 years for this media platform to attract 50 million listeners and it took almost 15 years for television to attract 50 million viewers[12]. Contrast this with the internet which took only 4 years to attract 50 million participants and finally Facebook, which took 18 months to attract 50 million participants[13]. Table 1 provides a global perspective with respect to how influential Facebook is as a social media platform.

Table 1. Facebook subscribers and world population statistics

World Regions	Population (2016 Estimated)	Population (% of World)	Facebook (30 June 2016)	Penetration (% Population)
Africa	1,185,529,578	16.2 %	146,637,000	12.4 %
Asia	4,052,652,889	55.2 %	559,003,000	13.8 %
Europe	832,073,224	11.3 %	328,273,740	39.5 %
Latin America / Caribbean	626,054,392	8.5 %	326,975,340	52.2 %
Middle East	246,700,900	3.4 %	76,000,000	30.8 %
North America	359,492,293	4.9 %	223,081,200	62.1 %
Oceania / Australia	37,590,820	0.5 %	19,463,250	51.8 %
World Total	**7,340,094,096**	**100.0 %**	**1,679,433,530**	**22.9 %**

Source: Facebook Subscribers and World Population Statistics updated as of June 30, 2016. For more information please go to www.internetworldstats.com.

The American Fisheries Society (AFS)[14] investigated social media using survey questions regarding the growth of online tools for networking across the organisation including[15]:

- How do other professional societies benefit?

- Is the current level of engagement enough?

- Who should evaluate this engagement?

- What platforms best suit the AFS's needs?

- How can the AFS capitalize on the talents of our membership?

- What level of online science communication support should the parent society provide?

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[12] Nair (2011, p. 46).

[13] Ibid.

[14] The AFS is a non-profit organization whose mission is to improve the conservation and sustainability of fishery resources and aquatic ecosystems by advancing fisheries and aquatic science and promoting the development of fisheries professionals; for further information click here. The AFS is comprised of a Board, committees and sub-committees.

[15] Claussen (2013, pp. 359-360).

Three major themes emerged from the AFS survey[16]:

- Most AFS chapters, sections and divisions (termed 'units') are engaged in social media at some level, indicating that this is currently an important form of communication for the membership;

- Of those units not engaged, individual assistance, workshops, and how-to guides were listed as ways the AFS could help, suggesting that if this information was more readily available, social media may be useful to these units; and

- There is significant interest among AFS leadership for the parent society to help units on the effective ways of using social media to communicate both within and outside of the society.

The study suggests that organisations need to develop and understand the extent to which social media is used and the effectiveness of communication because of its use.

2.3. SMALL BUSINESSES AND SOCIAL MEDIA

Mizrachi and Sellitto examined ways to build a Facebook strategy by investigating the use of Facebook amongst Australian small tourism enterprises (STEs)[17]. According to the authors[18]: 'literature on Facebook adoption by STEs is expanding but limited, especially the discussion around building Facebook presence and strategy'.

Eight case studies were used to understand the Facebook media strategies used amongst Australian STEs with six sub-themes identified[19]:

- Motivation to use Facebook – This theme reflected the value of social media (and Facebook) for the business and the reasons as to why the STEs used Facebook.

- Evaluation of Facebook presence – This theme reflected the monitoring and tracking of the Facebook page in order to optimise its performance (for instance, new comments that require a response, the most popular posts or audience demographics).

- Facebook content – This theme reflected content-related responses, which identified the types of content that the STEs posted, as well as the overall content strategy. Content was found to relate to text, photos and videos that appeared on the Facebook page.

- Challenges with operating Facebook – This theme reflected the difficulties with understanding the potential use of Facebook. These are the areas in which the STEs admit they required professional assistance with their Facebook presence.

- Multi-channel – This theme reflected how a business considers other social networks for marketing in addition to Facebook (for instance Twitter, Google+, or LinkedIn).

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[16] Claussen (2013, p. 361).
[17] Mizrachi and Sellitto (2015, p. 63).
[18] Ibid.
[19] Mizrachi and Sellitto (2015, pp. 71-72).

- Social media plans – This theme reflected future initiatives that the STEs had regarding social media, such as attending a social media workshop for skill improvement or using a new feature on Facebook.

The study identified the following issues amongst STEs[20]:

- While all STEs are aware of the immense influence that Facebook has in the business world, they tend to use it without a clear plan, long-term sales or marketing goals.
- Facebook pages were created due to affordability.
- Facebook presence allowed authentic dialogue with their stakeholders.
- STEs claimed they knew what their audience preferred when it comes to content, but could not define their target audience and or Facebook performance measures using available analytical tool.
- As early adopters, they identified and incorporated the newly emerging social networks (Facebook) into their marketing mix, setting up Facebook aims for their business, as well as planning future social media directives (including further professional training).
- It may also encourage late adopters STEs to use Facebook to achieve their business objectives, as well as lead to improved implementation of social media by those STEs.

2.3.1 AUSTRALIAN WINE INDUSTRY

In 2013, research was undertaken to examine the acceptance of social media technology in the Australian wine industry in the Yarra Valley, Victoria[21]. The purpose of the research was to investigate the wine industry's knowledge of the seven social media platforms and their social media practices. Three focus groups were used to obtain information regarding the perceptions of social media by individual wineries[22].

Participants were also categorised into small, medium or large wineries based on grape yield. Eighteen participants across 18 wineries took part in focus groups. Fifteen of the eighteen participants indicated that they had a poor understanding of social media. One of the 18 participants noted: 'I know I should be using it but don't know how', was broadly representative of participant's views.

Participants were open to accepting social media and dedicating the resources to test how social media works and how it can potentially increase sales. Most participants could not identify the differences between social media platforms. The outcomes of the study are outlined in Box 2.

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[20] Mizrachi and Sellitto (2015, p. 76).
[21] Strickland (2013).
[22] This paragraph and the following are draw from Strickland (2013, pp. 5-6) respectively.

Box 2. Yarra Valley Study Outcomes[23]

- Yarra Valley wineries do not utilise all social media platforms due to a lack of understanding and perception of little financial return.
- All wineries have a social media presence mainly being Twitter and Facebook but is considered very low compared with other industries.
- It is also apparent that the wine industry in the Yarra Valley does see potential in social media platforms to assist in sales generation but have not yet witnessed major success; therefore little time and financial investment is dedicated to this form of marketing. However, two of the large wineries actively using social media in their campaigns did suggest that social media does increase sales predominately through special wine releases and individual targeted promotions.
- All agreed that social media should be used to increase sales but the majority did not see social media campaigns in increasing brand awareness.
- The wineries of the Yarra Valley have a very low understanding of social media and how to use it to increase sales or revenues.
- The wine industry is open to change and will utilise it in the future but will only invest resources if there is a proven record of success either by reviewing other industry practices or trial and error in a low-cost manner.

2.4. RETURN ON INVESTMENT

McCann and Barlow investigated why SMEs are using social media and how they should measure ROI[24]. The authors noted[25]: 'the importance of a planned entry into the social media arena, formulation of measurable goals and objectives and understanding the business process are presented as vital pre-cursors to measuring, and indeed attaining, ROI'. There are many objectives and metrics available to assess ROI that involve a mix of quantitative and qualitative measures.

One-hundred and sixteen participants took part in a survey. The SMEs were asked why they originally considered using social media. There responses included[26]:

- Wanted to experiment with social media – 61%

- Competitors were using social media – 31%

- Customers using social media – 45%

- As a result of staff attending training/awareness session – 21%

- Staff knowledge of, and desire to use, social media in work-related capacity – 45%

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[23] Strickland (2013, p. 7).
[24] McCann and Barlow (2015, p. 273).
[25] Ibid.
[26] McCann and Barlow (2015, p. 279).

Table 2. Examples of social media objectives and metrics

Objectives	Examples of metrics
Improve customer service	• Track level of positive/negative comments • Analyse sentiment of customer comments • Measure time taken to resolve a customer service request
Increase sales	• Analyse sales volume by product, categories, location • Monitor landing pages/click-throughs that lead to purchase, from specific social media platforms
Improve brand awareness	• Analyse volume of mentions across channels, e.g. count the number of likes, visitors, followers, brand mentions • Track level of positive/negative comments • Analyse sentiment of comments • Analyse sources of comments • Ranking in search engines
Reduce costs	• Track change in costs • Benchmark number of customers reached through specific social media campaigns compared to other campaigns
Improve promotion of company products/services	• Assess customer feedback via social media channels • Number of page views • Number of RSS feeds • Number of comments • Track level of positive/negative comments • Analyse sentiment of comments
Building relationships with business contacts/customers	• Amount of user-generated content • Track number of followers/subscribers • Track number of unique visitors/regular visitors • Analyse sentiment of comments • Analyse source/quality of authors
Increasing volume of traffic to web site	• Number of incoming links • Number of visitors • Monitor landing pages/click-throughs from specific social media platforms • Ranking in search engines

Source: McCann and Barlow (2015, pp. 276-277).

Eighty-two per cent of survey participants indicated that they had several reasons for using social media including (1) raising awareness of the company and their products/services, (2) building relationships with customers and (3) driving the business forward and reaching a wider range of stakeholders[27].

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[27] McCann and Barlow (2015, p. 280).

The study also identified the following objectives[28]:

- Engage/interact with customers and other companies;

- Showcase business, products and services;

- Attract interest and awareness of SMEs;

- Increase brand awareness;

- Increase volume of traffic to SME's web site;

- Indirectly increase revenue;

- Answer queries and give advice; and

- Establish voice of authority, reputation and respect.

Sixty-five per cent of the companies involved in the study stated that they did not measure the benefit gained from the use of social media. The 35 per cent who did measure the benefit were asked what benefits they measured and how they measured them. A very wide range of answers were received, including qualitative and quantitative which are detailed in Box 3.

Box 3. Measuring benefits of social media[29]

Quantitative
- Number of contacts, followers and enquiries that have come through social media;
- Number of visitors through, e.g. Facebook diagnostics, number of hits on YouTube channel;
- Number of likes/comments on Facebook;
- Number of clicks, follows and responses; retweets;
- Number of bookings and referrals received via social media; and
- Sources of traffic to web site.

Qualitative
- Informally, by observation;
- What comments are saying and what it means for business;
- Views of promotions; and
- Brand awareness.

2.5. COMMUNITY ENGAGEMENT

Social media also plays a role in the process of community engagement and in the consultation processes. The term 'community engagement has been defined as[30]: 'seeking to better engage the community to achieve long-term and sustainable outcomes, processes, relationships, discourse, decision-making, or implementation'. Social media platforms can have multiple uses in terms of community engagement and initial stakeholder contact, use of surveys or other online data collection

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[28] Ibid.
[29] McCann and Barlow (2015, pp. 280-81).
[30] Center for Economic and Community Development, 'What is Community Engagement?' Pennsylvania State University.

tools (e.g. web pages established during fisheries review processes) and evaluation of engagement processes.

2.5.1. VICTORIA

Maribyrnong City Council provided an example of public participation that involved a hard-to-reach group in the community – children and young people. The purpose of the community engagement process was to design a new playground in the community. The process melded both social and traditional media to secure feedback for the council as noted in Case Study 1.

Case Study 1. Maribyrnong City Council[31]

> During 2016, Maribyrnong City Council identified and involved a broad range of stakeholders in the development of a new $750 000 playground. The project included engagement with the public on each aspect of the decision, including the development of alternatives and a preferred solution. The community influenced the draft concept plan and the final design, through an online survey, submissions, barbecue and listening sessions, and activities with children and young people.
>
> The council's online consultation platform 'Your city, your voice' was one of several tools used in the community consultation. The council encouraged people to visit the online consultation platform through social media, including Twitter, Facebook and a newsletter. Overall, the site received 299 site visits and 64 survey responses. The council distributed a project flyer to 1 500 households, and more than 100 pre-school and school-aged children provided visual responses.

The Victorian Auditor-General's Office (VAGO) has identified case studies demonstrating the link between social media and community engagement. In 2013, Ballarat conducted a large-scale community conversation initiative, Ballarat Imagine[32]. The council employed multiple community engagement approaches to involve as many community residents as possible.

The council supported their community engagement process by developing a traditional media (through a council magazine titled 'myBallarat')[33] and communications campaign, and community submissions on the council's website and social media.

The campaign resulted in the following:

- 1,000 conversations with the Ballarat community'
- More than 6,500 completed responses;
- 98 residents volunteering to join a community reference group;

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[31] VAGO (2017, p. 18) – copied from Figure 2I.
[32] VAGO (2017, p. 15).
[33] The following links provide an example of melding traditional and social media platforms – magazine and website: myBallarat.

- Ballarat Imagine informed the new council plan for 2013–2017; and

- The 2013–14 budget and the Ballarat strategy.

Case Study 2 provides a detailed overview of the Ballarat Imagine process and the involvement of social media.

Case Study 2. Ballarat Imagine[34]

The City of Ballarat began developing 'Today Tomorrow Together: the Ballarat Strategy' by conducting Ballarat's largest ever community conversation, Ballarat Imagine. It began in late February 2013 and asked the community to respond to three main questions:
- The things I love about Ballarat are …
- The things I imagine for Ballarat are …
- The things to retain in Ballarat are …

The council released a discussion paper to help community groups, businesses and government agencies have their say on the issues affecting Ballarat's future. A key factor in the initiative's success was the many ways community members could respond, including:
- By mailing back a postcard that was distributed through events, community groups, shops, cafes and council facilities.
- By mailing back a card that was attached to My Ballarat, a publication sent to every home and many businesses in Ballarat.
- Through the council website.
- Through Twitter and Facebook.
- By talking to councillors and council officers at events and stalls across Ballarat.
- By filling in the full-page form in the Courier and sending a photo.
- By writing on the chalkboards placed at events and council facilities.
- Through schools, which had their students draw or write about their ideas for Ballarat's future.
- By making a written submission on the discussion paper, which was posted to hundreds of community groups, businesses and government agencies.
- By organising a meeting with council staff.

Importantly, the council demonstrated how the results of Ballarat Imagine informed its vision and planning for the future. The strategy will guide much of the council's work over the next decade. For example, it will:
- Guide the future growth of the city by answering questions like 'which areas will grow and which will not'.
- Guide infrastructure and service delivery to make sure it is coordinated with growth.
- Help the council to respond to the important social, economic and environmental challenges Ballarat will face up to 2040.

2.5.2. NEW SOUTH WALES

In 2009, the NSW Legislative Council General Purpose Standing Committee conducted an inquiry into bullying of children and young people[35]. The Committee considered that an online survey would be a

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[34] VAGO (2017, p. 16) – copied from Figure 2F.
[35] NSW Legislative Council, General Purpose Standing Committee No. 2, Bullying of children and young people, Report 31, November 2009.

useful way to encourage the participation of children and young people who would be less likely to draft a formal submission. The inquiry also covered cyber-bullying so the Committee decided on exploring social media as a way to engage children and young people.

There were risks and benefits to using social media and the Committee were aware of the potential benefits of using online consultation. Some Committee members questioned the need to conduct an online survey at all, thus raising the political stakes if the survey was not a success. One of the major challenges posed by this exercise in using social media1 is relatively uncommon among Australian legislatures and there is no history of its use as a clearly identifiable source of guidance. The risks and benefits included[36]:

Risks
- Online survey would receive a small number of responses.
- Ridicule in the print and television media which would suggest the process was a waste of taxpayers' money.
- Another challenge arose concerning the survey design and survey advertisements – overly complicated language could limit responses.
- Potential psychological impacts of victims of bullying and ensuring support services were available.
- Would responses be covered by parliamentary privilege?
- Requirement to provide address and contact details to authenticate responses replaced with an email address.
- IT infrastructure secured (as much as possible) against potential hackers.

Benefits
- 300 responses received from a notoriously difficult group to survey: children and young people.
- Promotion of Parliamentary process amongst the community.

2.5.3. UNITED KINGDOM

In mid-2016, over 1,401 councillors in England, Scotland and Wales undertook a survey regarding the use of social media[37]. The survey was conducted through an online interview sent via email to councillors across the United Kingdom, providing a link and invitation to take part in the survey. Results are weighted by political party, council type and region to give a sample that is representative of councils in the United Kingdom.
- 75% of 1,401 councillors said social media is an important or very important engagement tool.

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[36] Duffy and Foley (2011, pp. 203-205).
[37] YouGov (2016, pp. 2-13).

- There is a high level of agreement that social media is an important engagement tool across all three of the major political parties. Labour and Liberal Democrats are slightly higher with 81% and 82% respectively, compared to Conservatives with 70% agreeing.
- 54% said social media carried 'a great deal' or 'quite a lot' of weight in the consultation process currently.
  - When questioned as to the weight given to various methods of public consultation, community meetings were still seen as having the most value, with 82% saying they carried 'a great deal' or 'quite a lot' of weight. However, 54% said social media carried 'a lot' or 'a great deal' of weight.
- Over 34% believe public responses gathered via social media should be included as part of a Statement of Community Involvement (SCI)[38].
  - Over a third (34%) of participating councillors said that they would like to see public responses gathered via social media included as part of an SCI, with a further 38% saying it depends on the circumstances.
- 60% believe developers should be engaging with local communities through social media.
  - 68% and 67% of Labour and Liberal Democrats respectively; slightly fewer, but a significant 54% nonetheless amongst Conservatives. A fifth of Conservatives (20%) disagree and just 12% and 18% of Labour and Liberal Democrats respectively believe that no, it is not a requirement for developers to be using social media to engage the community.
- 74% believe social media would add value when reviewing planning applications.
  - 39% of councillors taking part stated they would take public responses collected via social media platforms into account when reviewing a planning application, believing it important to listen to the wishes of the communities that developers are working in.
- 60% believe social media will increase in importance as a public engagement tool.
  - Over the next three years, 60% believe social media will increase in importance as a public engagement tool.

The outcomes of the survey suggest it is possible to encourage broader participation from a much wider cross-section of stakeholders. Whereas the problem with public consultation as a process currently is that it can fail to engage many of those who could potentially be advocates for government. This outcome is applicable to the seafood industry – how could the seafood industry gather advocates from the community using social media? If the seafood industry could gather advocates what would this mean for SLO?

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[38] An SCI is a statement on how the local community and others will be involved in the preparation of the Local Development Framework and the consideration of planning applications in the United Kingdom.

2.6. SOCIAL LICENSE TO OPERATE

The Australian Seafood Industry is accountable to the community and a range of specific stakeholder groups within the community (e.g. government through fisheries management and conservation agencies). The marine resource is a shared resource and industries that access that resource have obligations to the broader community. These obligations can be brought under the term SLO. For the purposes of this report SLO is defined as[39]: 'the ongoing acceptance or approval from the local community and other stakeholders'. Ogier and Brooks (2016) have argued that SLO is centred around relationship development and the management of that relationship. The authors note[40]:

> SLO is not something to think about when a crisis or issue arises – that's what crisis management strategies are for. SLO tactics are not a public relations strategy to deal with a crisis or bad press. SLO is about developing relationships in advance to prevent issues arising or having the relationships in place to arrest and minimizing them if they do occur.

Communicating shared values between business and stakeholders will help build trust and develop relationships[41]. To do this commercial seafood businesses need to name shared values and develop strategies to ensure these shared values are communicated across industry and amongst key stakeholders.

Engaging and developing a relationship with the community involves using traditional and social media platforms to convey values. Ogier and Brooks (2016) cited a concept of creating a 'platform of common values' to help build social license[42]. The authors make a link between social media and SLO.

Box 4. Communicating[43]

- Communication messages and activities now can be developed on the platform of common values.
- Every single communication activity presents an opportunity to tell your values message.
- Your business activities and behaviours are already communicating your values (business behaviours and activities are the most powerful form of communication - don't rely on social media platforms alone!).
- Your communication activities about values can also complement your broader business communications that sells your seafood product (marketing). But remember selling product (marketing and regular product advertising) is telling people about what you can do for them. It is very different from selling your brand (your business values) which is reinforcing that you share similar values.
- Social media conversations can focus on common values and issues that are of concern.

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[39] Sen (2013, Slide 3).
[40] Ogier and Brooks (2016, p. 4).
[41] Ogier and Brooks (2016, p. 36).
[42] Ogier and Brooks (2016, p. 42).
[43] Ibid.

3. METHODS AND RESULTS

3.1. METHODS

This section outlines the methodology used to survey commercial seafood business owners.

3.1.1. SURVEY TOOL

An online survey instrument was developed with the assistance of seafood industry contacts. The aim was to ensure the questions were relevant to an industry audience. Participation was voluntary and was sent to industry members across Australia. The survey was provided in paper and electronic formats.

3.1.2. INDUSTRY ENGAGEMENT

The survey was open to commercial seafood business operators (wild harvest, aquaculture and post-harvest sectors). The survey was distributed through multiple channels including online survey company, Survey Monkey and a posted paper survey.

3.1.3. DEMOGRAPHICS

The information in this section provides a detailed demographic breakdown of respondents. In some cases, the respondent did not provide demographic information. Three sectors were invited to participate in the survey: (1) aquaculture, (2) wild harvest and (3) post-harvest.

The total number of respondents was 64. Participants responded from the following States: QLD – 37; NSW – 13; VIC – 4; SA – 2; WA – 1. Seven respondents did not indicate their State or Territory.
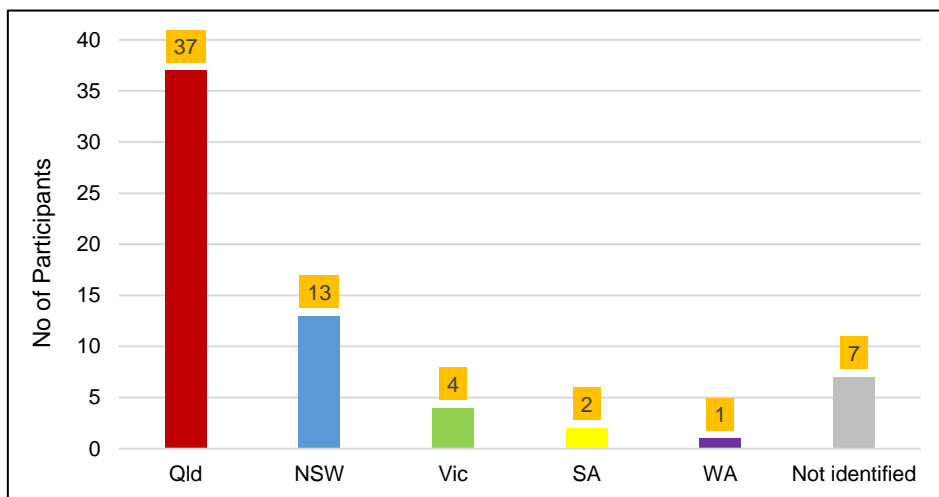

Figure 1. Participant locations (N = 64).

The majority of participants were 50 years or older which made up 60% of the survey age group. The second largest group was the 40-49-year age group which accounted for a quarter of the population who responded to the survey. Respondents under 39 made up 16% of the survey demographics with the smallest age group being 18-29.
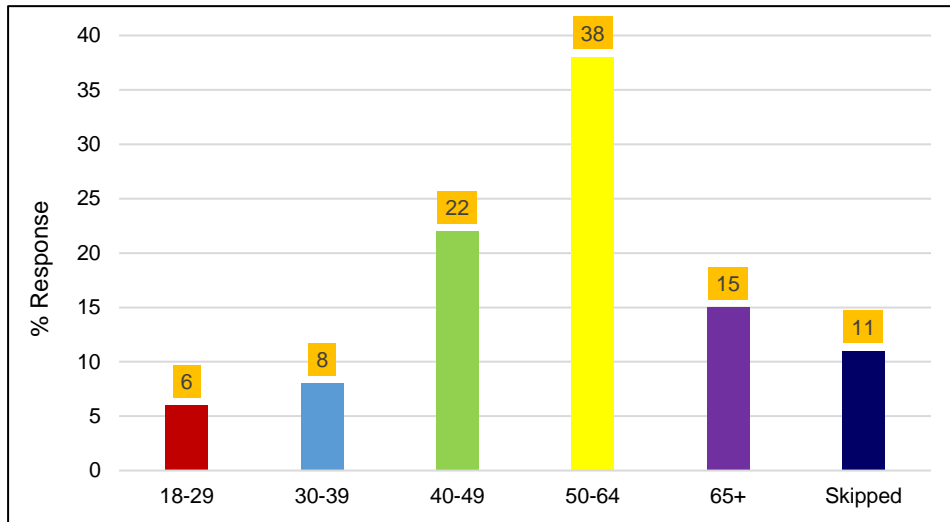

Figure 2. Age structure (N = 57, Skipped = 7).

Fifty percent of participants were male, 20% were female and almost a third did not respond to the question.
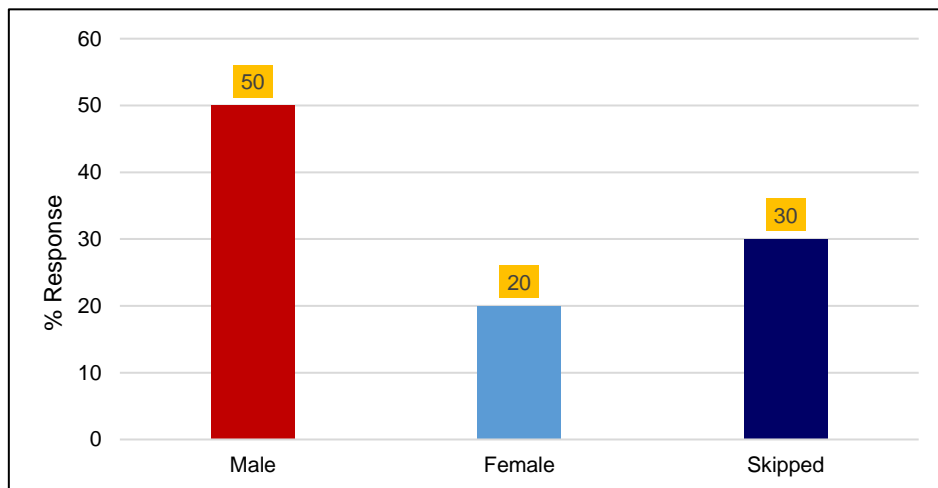

Figure 3. Gender (N = 45, Skipped = 19).

3.2. RESULTS

This section provides the responses to the survey tool on a question by question basis. More detailed analysis will be provided at Section 4.

Q.1. How often, if at all, do you access the Internet – either on a computer or on your mobile phone or other devices such as an iPad or iPod Touch?
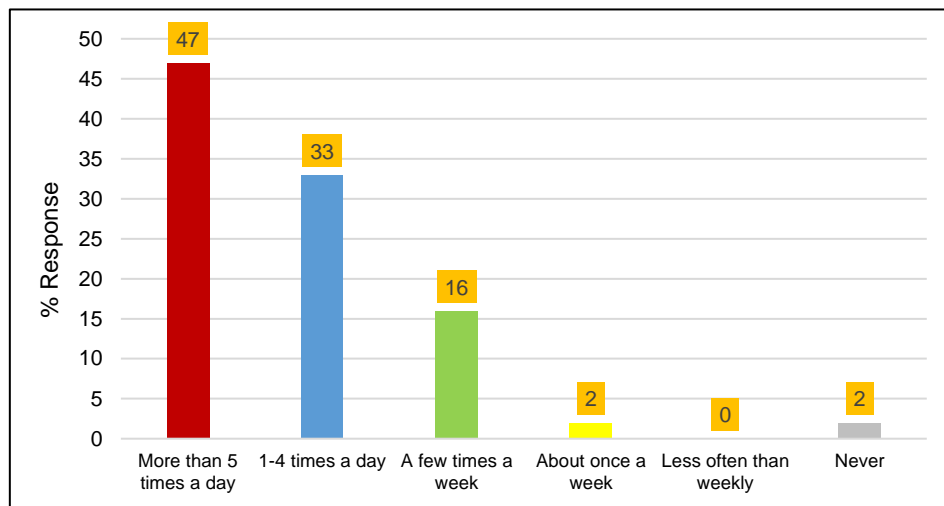

Figure 42. Accessing the Internet (N = 64).

Participant Response – Almost 50% of participants used mobile devices more than 5 times a day. One third used mobile devices 1-4 times a day.

Q.2. How often, if at all, do you use social networking sites such as Facebook, Twitter, Instagram or LinkedIn?
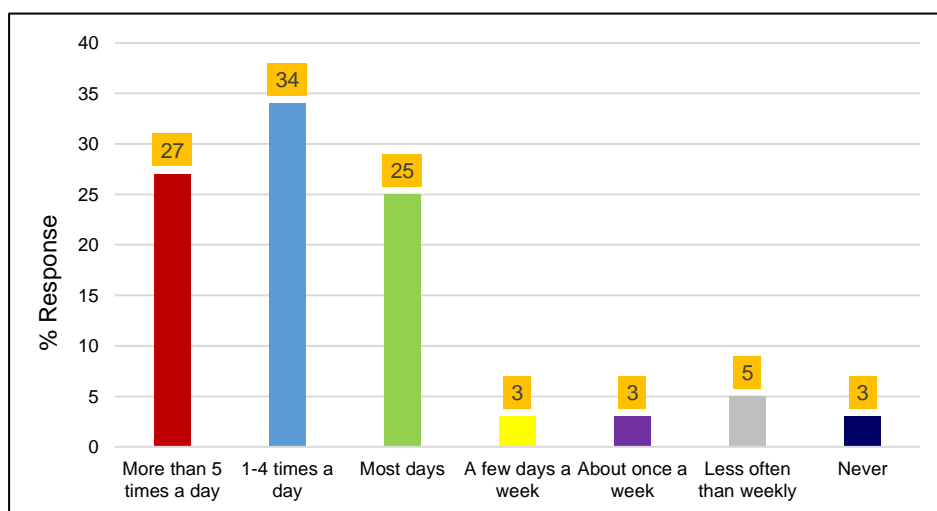

Figure 5. Accessing Facebook, Twitter, Instagram or LinkedIn (N = 64).

Participant Response – Almost 90% of participants are regularly accessing (most days if not more) Facebook, Twitter, Instagram and LinkedIn.

Q.3. When do you most commonly look at your social networking sites?
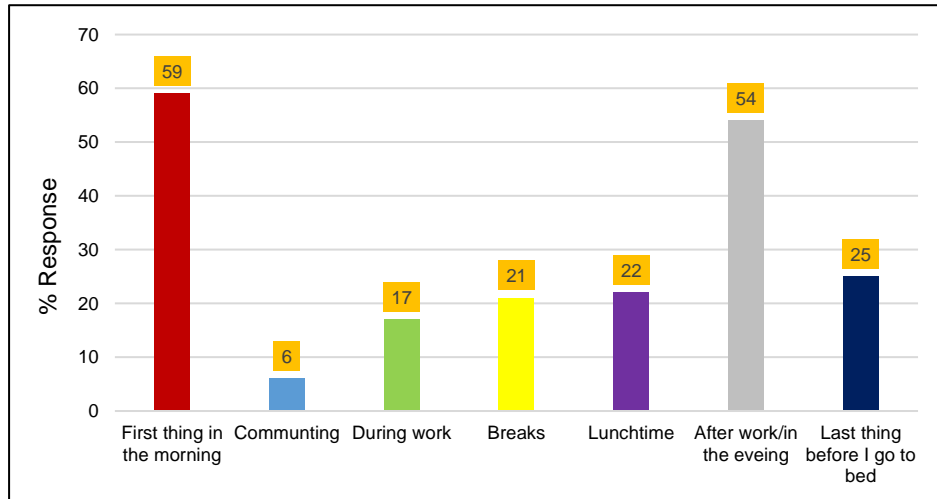
Figure 6. Time of day social media accessed (N = 63, Skipped = 1).

Participant Response – Participants tend to either access social networking sites in the morning or after work / evening.

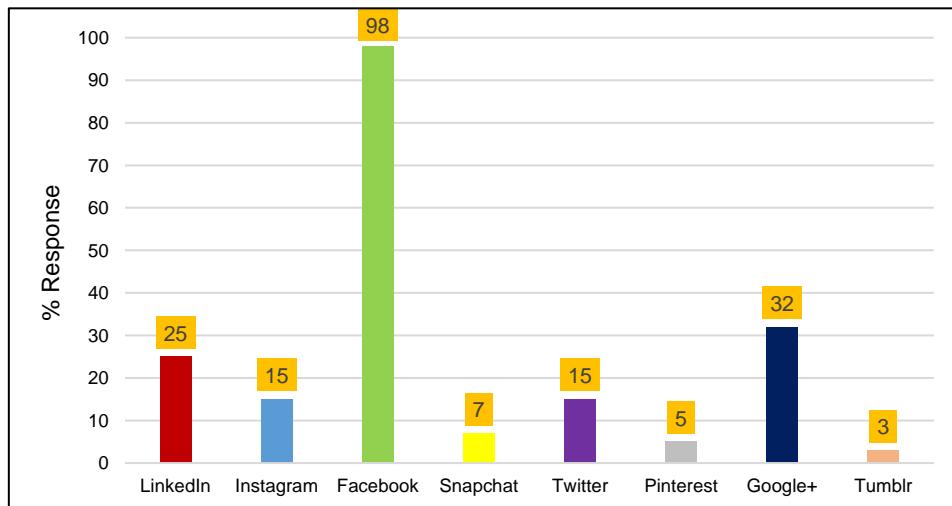*Q.4. What social networking sites do you use?*

Figure 7. Access to social media sites (N = 60, Skipped = 4).

Participant Response – The most frequently accessed social media sites included Facebook (98%), Google+ (35%) and LinkedIn (25%). Vine, Yelp and Foursquare were excluded from analysis as they were not accessed by participants.

Q.5. In a typical week, how many times would you use the following social networking sites?

Table 3. Frequency of using social networking sites

Sites	Frequency of access per week (%)						
	Under 1	1 to 2	3 to 5	6 to 10	11 to 19	20+	Can't say
LinkedIn (N = 36)	39	14	5	14	3	8	17
Instagram (N = 32)	44	6	0	16	3	3	28
Facebook (N = 59)	5	5	8	14	8	58	2
Snapchat (N = 28)	53	7	4	4	4	0	28
Twitter (N = 34)	50	3	9	6	6	6	20
Pinterest (N = 27)	63	0	4	4	0	0	29
Google+ (N = 38)	29	5	8	5	3	21	29
Tumblr (N = 26)	58	4	0	0	0	4	34

Participant Response – The most frequently used social networking sites cited by participants included Facebook, LinkedIn, Twitter and Instagram. Vine, Yelp and Foursquare were excluded as they were not accessed by participants.

Q.6. Roughly how long would you spend each time you use the following social networking sites?

Table 4. Time spent on social networking sites

Sites	Time spent per day (%)						
	Up to 2 minutes	3 to 5 minutes	6 to 10 minutes	11 to 15 minutes	16 to 30 minutes	Over 30 minutes	Can't say
LinkedIn (N = 32)	22	16	16	3	9	0	34
Instagram (N = 26)	31	11	4	4	4	4	42
Facebook (N = 57)	5	14	14	11	18	33	5
Snapchat (N = 22)	36	5	5	0	0	6	50
Twitter (N = 27)	22	11	3	0	8	8	48
Pinterest (N = 21)	19	5	0	5	5	0	66
Google+ (N = 30)	13	20	7	3	3	17	37
Tumblr (N = 20)	20	5	0	0	0	5	70

Participant Response – Participants spent considerably more time using Google+ and Facebook. Vine, Yelp and Foursquare were excluded as they were not used by participants.

Q.7. Compared to last year, have you increased, decreased or spent about the same amount of time using social networking sites?
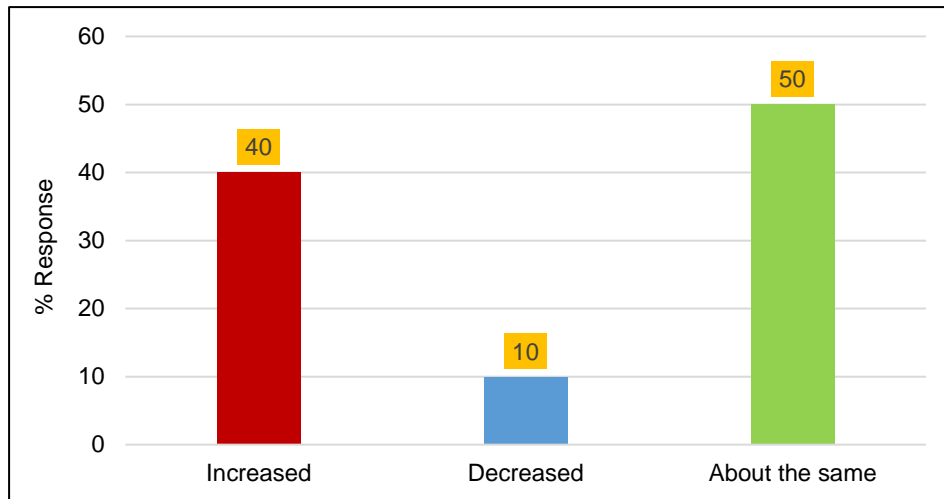

Figure 8. Changes in use of social media networking sites (N = 60, Skipped = 4).

Participant Response – Ten percent of participants indicated a decreasing use social media networking sites. Forty percent of participants indicated an increased use of social media networking sites.

Q.8. What type of device do you own?

Table 5. Devices owned by participants

Devices (N = 60, Skipped = 4)	Response (%)
Laptop	68
Smartphone	73
iPad or other tablet	28
Personal Computer	17
Internet enabled TV	3
iPad Touch	0

Participant Response – Smartphones (73%), Laptops (68%) and iPad or other tablets (28%) are the top three devices owned by participants.

Q.9. What devices do you use to access social network sites?

Table 6. Device used to access social media

Devices (N = 60, Skipped = 4)	Response (%)
Laptop	57
Smartphone	73
iPad or other tablet	35
Personal Computer	25
Internet enabled TV	12
iPad Touch	2

Participant Response – Smartphones (73%), Laptops (57%) and iPad or other tablets (35%) are the dominant devices used by participants to access social media sites.

Q.10. For what reasons do you use social networking sites? Remember, we are talking about sites such as Facebook or Twitter and not the Internet in general. For which of these reasons do you use these types of sites?

Table 7. Reasons for using social networking sites

Reasons (N = 59, Skipped = 5)	Response (%)
Catch up with family and friends	83
Share photographs or videos	52
Get information on news and current events	69
Coordinate parties or other shared activities	8
Follow or find out about particular brands or businesses	30
Find out about entertainment events	7
Play games	7
Research holiday destinations or travel offers	17
Follow particular brands to access offers or promotions	7
Research products and services you might want to buy	29
Find people with the same interests	24
Meet new friends	10
Follow celebrities	2
Provide reviews/write blogs about products you have bought	2
Pressure from family and friends to use them	0
Engage with a government representative or department	25
Find potential dates	0
To watch videos	15
Other (please specify)	17

Participants also provided the following responses:

- 'See what crap the Government going to put on us next'.
- 'Tutorials, special interest information articles'.

- Admin for non-profit organisation'.
- 'To share information about our industry'.
- 'Connect with other people in the fishing industry and find out information about what is going on in other areas'.
- 'Keep up to date with commercial fishing'.
- 'Engage with other commercial fishers'.
- 'For business'.

Participant Response – The primary reasons cited by participants for using social media sites were for personal reasons, catch up with family and friends (83%), share photographs or videos (52%) and access information on news and current events (69%).

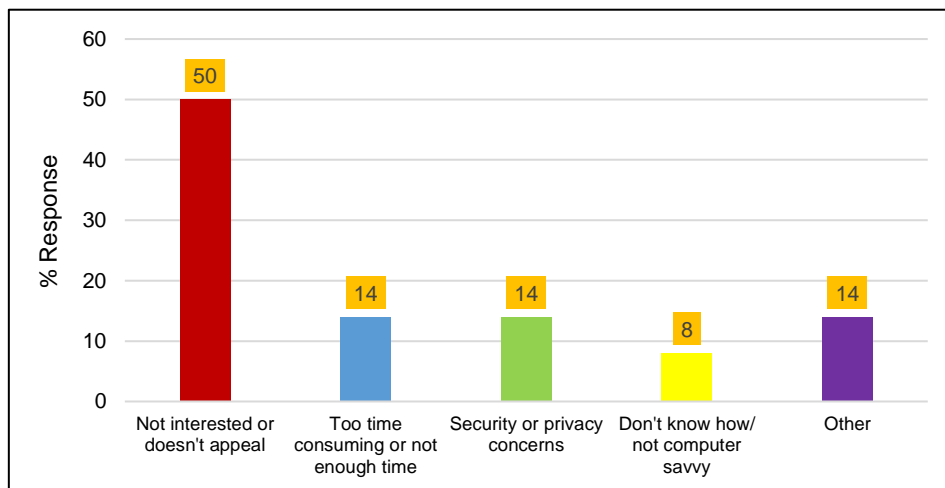*Q.11. Why don't you use social networking sites?*

Figure 9. Reasons for not using social media (N = 50, Skipped = 14).

Participant Response – It was noted by half of the participants that they were not interested or there is no appeal in some social media sites.

Q.12. Over the past year, have you stopped using any social networking sites?

Table 8. Ending the use of social media sites (N = 57, Skipped = 7)

Yes (%)	No (%)
7	93

Participant Response – The majority of participants have continued their use of social networking sites.

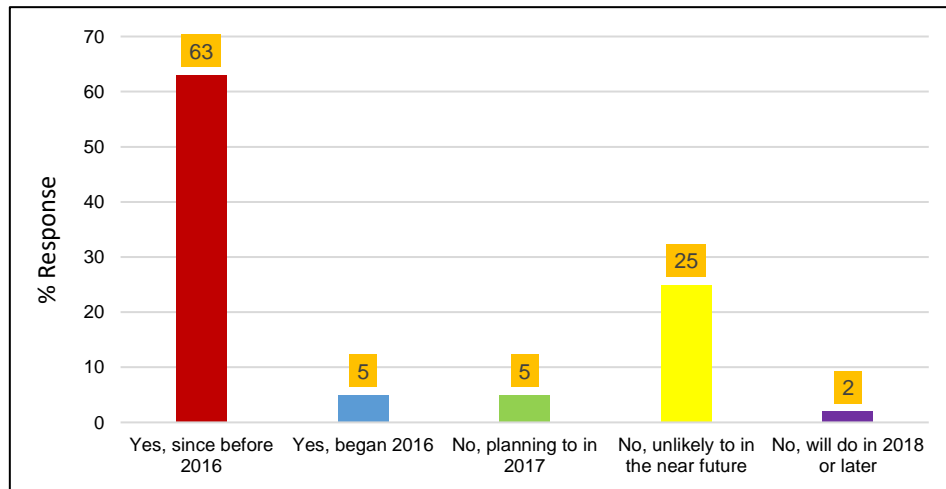*Q.13. Do you use social media in your business?*

Figure 10. Social Media and Business (N = 54, Skipped = 10).

Participant Response – Almost 70 percent of participants are using social media in their businesses. Almost a third have no intention to use social media in the future.

Q.14. Is social media important to your business?

Table 9. Importance of Social Media (N = 55, Skipped = 9)

Yes (%)	No (%)
65	35

Participant Response – Almost two-thirds of participants believe social media is important. There is support for the use of social media in order to reach stakeholders, advertise and promote industry.

Themes generated from this survey item included:
- 'Marketing and advertising.'
- 'Industry information'.
- 'Reaching a youth audience'
- 'Staying up to date on the government's latest efforts to destroy my livelihood'.
- 'Information sharing'.
- 'Recruitment'.
- 'Explore new markets'.
- 'Positive promotion of industry'.
- 'Real time engagement with industry and other stakeholders'.

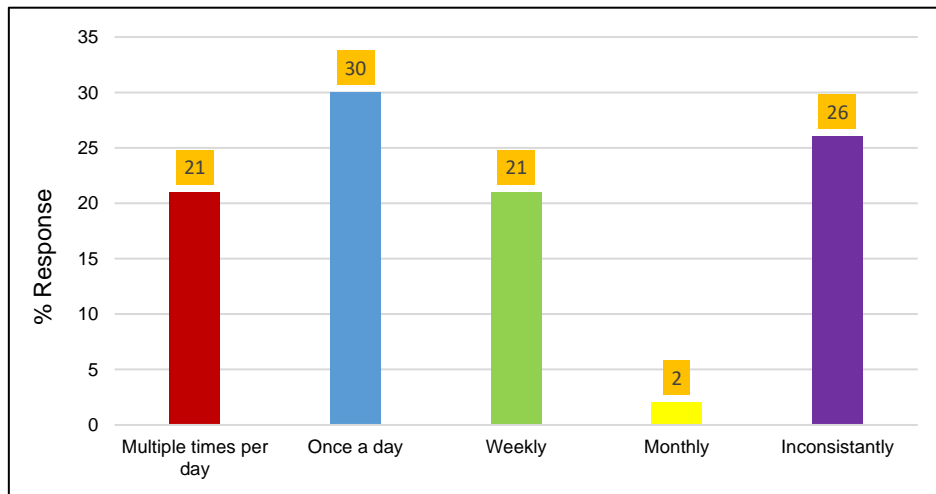*Q.15. How often do you engage your followers on social media?*

Figure 11. Engaging Followers (N = 47, Skipped = 17).

Participant Response – Almost 75% of respondents indicated ongoing use of social media; almost a third access social media daily and one fifth of participants accessing social media multiple times per day. Themes generated from this survey item included:

- Information tool.
- Potential use as a business tool.
- Ability to tailor messages to different audiences.

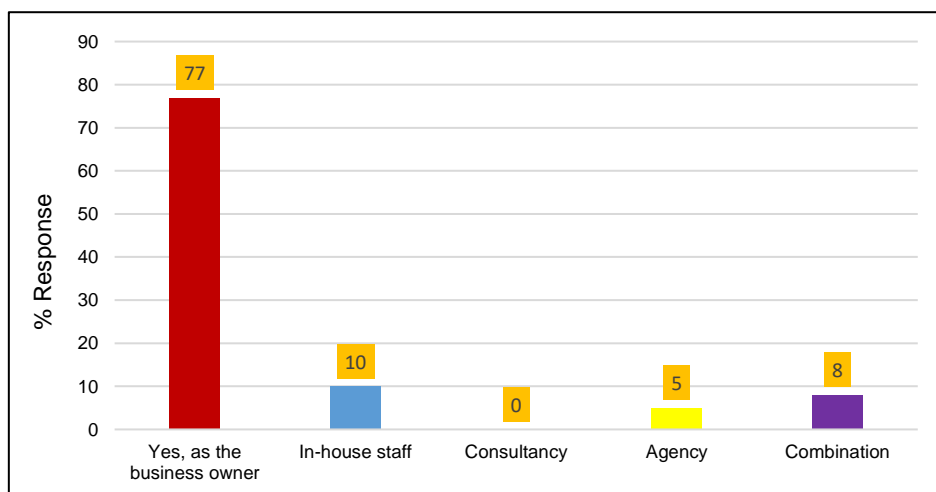*Q.16. What resources does your business use to engage in social media marketing?*

Figure 12. Resources used to engage social media.

Participant Response – Social media marketing was primarily managed by the business owner not through a third party.

4. DISCUSSION

This section will provide a discussion of the issues raised in the literature review and survey findings.

4.1. SOCIAL MEDIA SURVEY 2017

There were 64 participants that took part in the survey instrument. This sample suggests some care should be taken to generalising the results of the survey to the Australian Seafood Industry. The survey themes include:

- There is regular access to the Internet via computers or mobile devices.
- There is also regular access to social networking sites which are being accessed either first thing in the morning or at the end of a work day.
- Facebook, Google+ and LinkedIn are the most utilised social media platforms.
- Laptops and Smartphones are the technological access points in this report. This may reflect the nature of work in the Australian Seafood Industry where the reliance on Smartphones is a business necessity.
- Data in Table 7 suggests that social media may serve a mix of social, non-business information/communication needs versus business information/communication needs.
- One-fifth of participants noted that they regularly engaged with followers on social media which may suggest that social media platforms and their use are not yet an integral part of Australian Seafood Industry businesses.
- Social media marketing is primarily managed by business owners and not a third party.

Overall, participants in the study indicated that social media is important for both business and social purposes. It should also be noted that the data suggest a potential grey area between personal versus professional/business use of social media.

4.2. IMPACTS OF SOCIAL MEDIA

Industries across Australia are grappling with the implications of social media, the Australian Seafood Idustry is no exception. Television, radio and the Internet took years to amass 50 million followers – it took Facebook 1.5 years to do the same. The global, national, regional and local level reach of social media makes its use too tempting to avoid. This does not mean there are pitfalls to be avoided and at present, there is little if any discussion or research across the Australian Seafood Industry about potential issues.

The reach of social media should not be underestimated. The ability to start, build and maintain customer / stakeholder relationship is a powerful motivator for commercial seafood businesses to use social media.

The Australian wine industry has embraced social media. The ability of social media to assist in generating sales or potentially increasing sales as part of a marketing strategy is remarkable. An interesting finding amongst wine industry businesses and the successful integration of social media may lay in business size. Larger wineries may have the capacity to task an employee or a group of employees to engage in the social media space compared with smaller business who cannot afford this cost.

Small tourism enterprises (STEs), like small businesses in the Australian wine industry, have embraced social media[44]. The authors also noted in their study, that Facebook was used by STEs without a clear social media plan, long-term sales or marketing goals.

SMEs using social media may have an easier pathway to determining if there is some degree of planning and/or goal setting before a ROI measure can be applied. Australian seafood businesses may ask the following questions: What would the ROI be for an SME in the Australian Seafood Industry?

McCann and Barlow provide multiple examples of ROI objectives that can be used by SMEs (see Table 2). Forty-one participants in the study outlined by the authors measured the benefits of social media under two groupings[45] – (1) Quantitative (e.g. number of contacts or number of bookings and referrals) and (2) Qualitative (e.g. what comments are saying or view of promotions).

4.3. COMMUNITY ENGAGEMENT

Community engagement has been championed by multiple layers of government – Local and State. The Victorian example cited in this report use multiple social media platforms as well as traditional media (e.g. newspapers) and a strategy that is underpinned by planning. The United Kingdom example suggests that community engagement can lead to strong community support and feedback but could be restricted to topics that are important to rate payers such as Local government planning.

4.4. SOCIAL MEDIA AND SOCIAL LICENSE TO OPERATE

Ogier and Brooks provide critical insights into the connection between social media and SLO. Their work was focussed on SLO and not the impacts of social media on SLO. This potentially creates a policy and research vacuum for industry. Creating, building or maintaining the SLO is an ongoing issue facing industry with no quick fix. The Australian Seafood Industry is faced with the following issues:

- Industry engagement on the SLO issue will take time;
- Engaging in SLO will require business and industry resources; and
- SLO will require industry to challenge the predominant culture and norms.

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[44] Mizrachi and Sellito (2015).
[45] See Box 3, page 13 of this paper.

Part of the challenge will be how Industry communicates with stakeholders, which may include the more traditional media or using social media platforms or a combination of both. The use of social media can be maximised from a business needs to focus on a service or product that the community value. Australian commercial fisheries provide both a service (e.g. retail and/or restaurant experience of seafood) and product (e.g. direct purchase of seafood from commercial fishers) experiences.

Social media may help create an emotional/experiential connection between the seafood consuming public (community) and the Australian Seafood Industry. Ogier and Brooks caution that industry should not rely solely on social media alone. The authors argued that business activities and behaviours communicate values – business behaviours and activities are the most powerful form of communication[46]. The implication here is that connecting with a community of interest will require a mix of communication tools that may include social media.

4.5. COMMUNITY AND STAKEHOLDERS

Social media is a means of communicating with communities and stakeholders. A useful guide for the range of communities and stakeholder is provided in Figure 13.

Figure 13. Ewing (2013, Slide 6).

The importance of each community or stakeholder will help determine the social media platform used to communicate. Some communities and stakeholders will be more important than others and this may change over times.

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[46] Ogier and Brooks (2016, p. 42).

4.6. LIMITATIONS

The sample size of 64 limits the extension of findings but does point to potential trends that require further exploration. With a sample size of 64 a State and Territory breakdown of responses would not be appropriate. Care has been taken to ensure findings provide some insights but are not fully representative of all Australian commercial seafood industry businesses.

5. RESEARCH RECOMMENDATIONS

There is limited research regarding social media and the Australian Seafood Industry. Based on the literature review and survey data in this report the following research issues have been identified for industry consideration.

5.1. STRATEGIC SOCIAL MEDIA

- What are the benefits and barriers facing Australian Seafood Industry SMEs with respect to the use of social media?
- What are the benefits and barriers facing Australian Seafood Industry large business enterprises with respect to the use of social media?
- What are best practice standards for the use of social media platforms?

5.2. PERSONAL VERSUS COMMERCIAL USE OF SOCIAL MEDIA

- Is there are a clear separation between the personal and professional use of social media?
- If a commercial fisher engages in an online forum discussion is that interaction undertaken as a private individual or commercial fisher (business owner)? Who makes that distinction and what are the implications for the individual fisher's business and industry?

5.3. ROLE OF INDUSTRY ASSOCIATIONS

- How are Australian Seafood Industry associations using social media platforms (e.g. on behalf of members and in co-ordination with other associations)?
- Who are the target stakeholders and sector aims and messages?
- Does the association have a plan or strategy underlying the use of social media?

5.4. COMMERCIAL SEAFOOD BUSINESSES

- What issues are preventing or limiting the adoption of social media technologies across the Australian Seafood Industry?
- What is the ROI for Australian commercial seafood businesses from using social media platforms?
- What ROI measures are SMEs and large business enterprises using across the Australian Seafood Industry?
- What insights can non-monetary measures provide to industry?

5.5. LEARNING FROM OTHER INDUSTRIES

- What can the Australian Seafood Industry learn from the experience of the Australian tourism, wine and agriculture industries in relation to social media?
- What can the Australian Seafood Industry learn from the experience of the international tourism, wine and agriculture industries in relation to social media – e.g. United States and New Zealand?

5.6. COMMUNITY ENGAGEMENT

- What can industry learn from the experiences of the Australian Local government community engagement processes and the use of social media platforms?

5.7. SOCIAL LICENCE TO OPERATE

- What is the connection between social media and SLO?
- To what extent can social media help build SLO?
- To what extent can social media diminish industry's SLO?

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